

QUICK START GUIDE

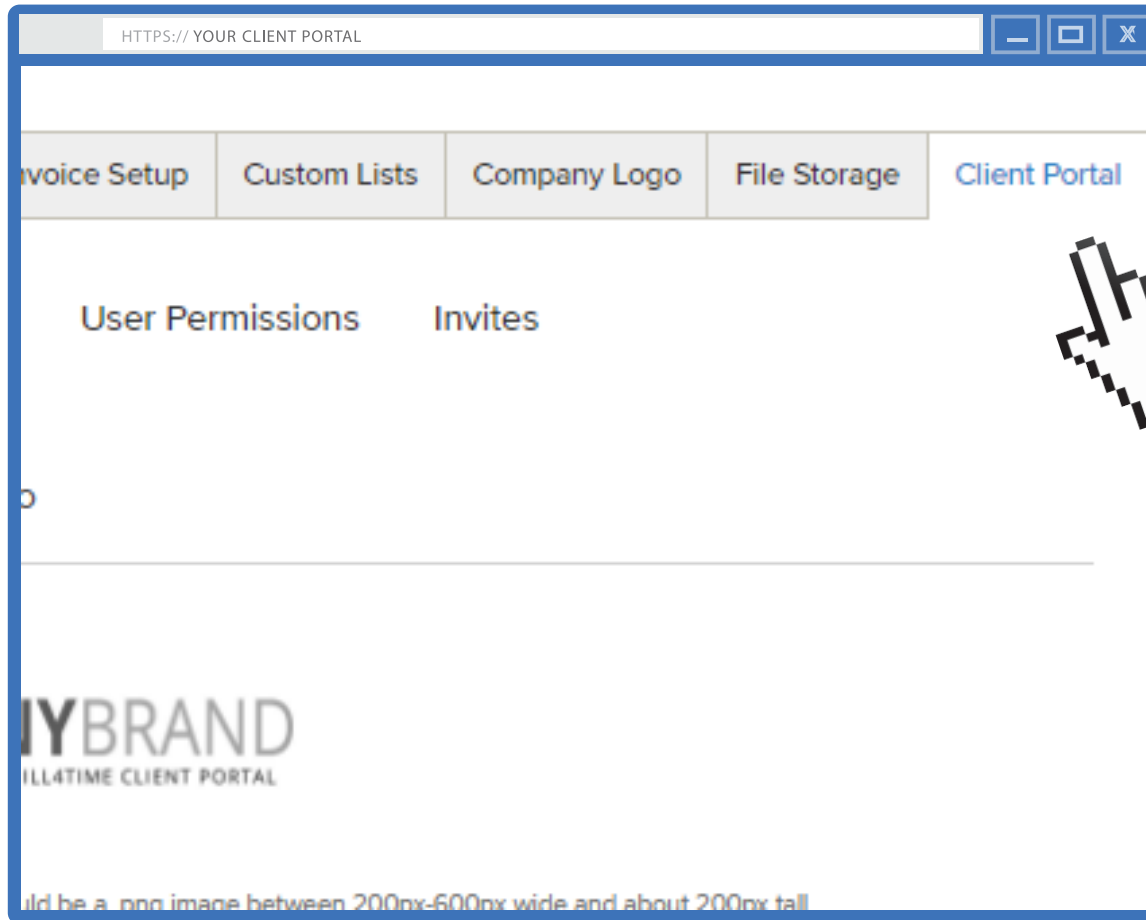
From start to finish, admin to user, we will quickly cover each topic in your new Client Payment Portal.

This should only take a few minutes, we promise.

May 2017 QSGV.150209.2

Log Into Your Client Portal

To access your Client Portal settings, click your name at the top right of any page and select Settings. From there, you will have access to your Client Portal tab. *Please note if you do not have access to Settings you will need to contact your System Admin to grant you these permissions.*





Upload Your Logo

For best results, your logo should be a PNG image between 200px and 600px wide and about 200px tall.

Pick a file, upload, and you're done!

Let's Configure Your Payment Options



Stripe is the premier credit card processor that allows your clients to pay with ease. The option for your clients to setup and make payments through ACH is also available through Stripe.

Not a stripe user? Just click the "Connect with Stripe" and you'll be setup within minutes. More info - <https://stripe.com/us/pricing>



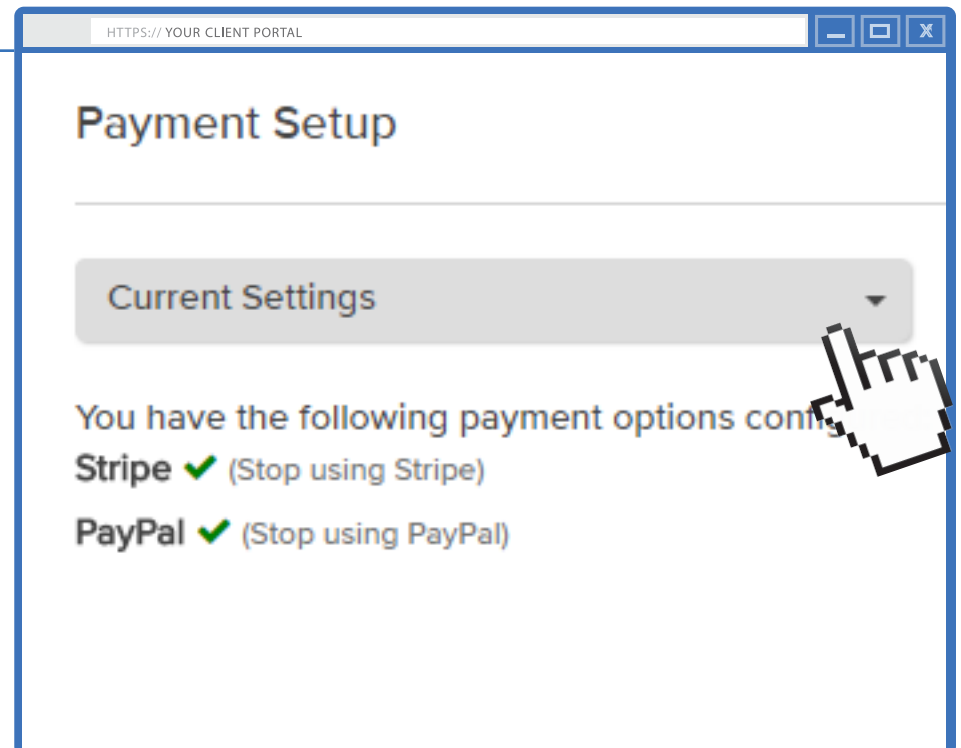
In addition to Stripe, you can also enable integrations with PayPal and Lawpay, or you can use a custom link that directs customers to your own payment portal.

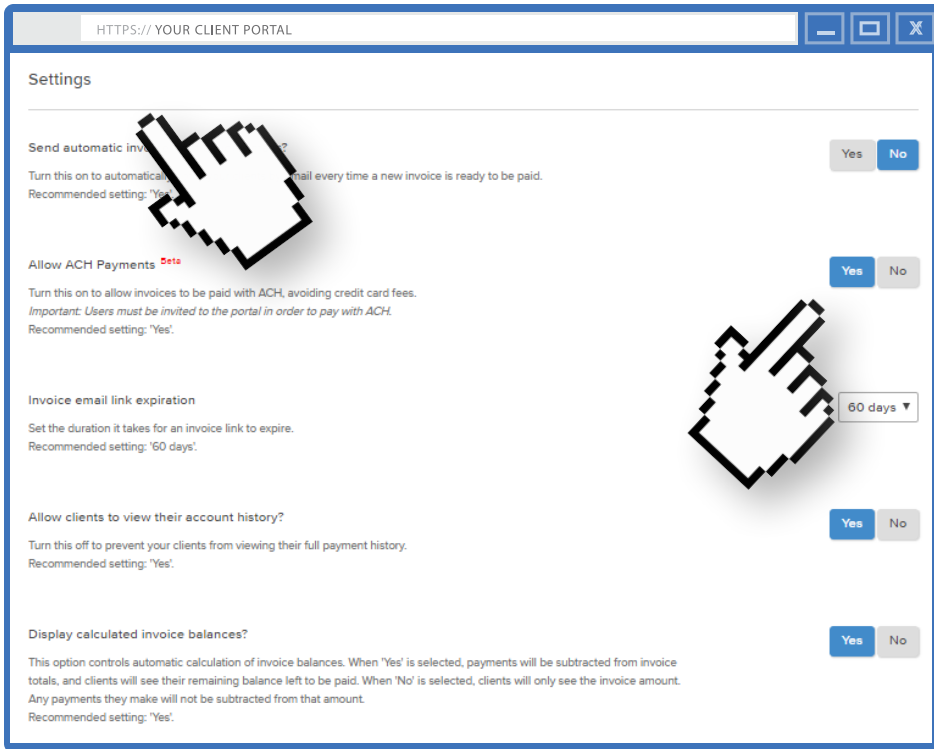


CREDIT CARD PROCESSING



Your Complete Time Billing Solution





Client Settings

Before you start inviting your clients to use the Bill4Time Client Portal, please take a moment to review the following settings:

ACCOUNTING SETTINGS

Allow your clients to view their history of invoices or keep it strictly to payments.

EMAIL SETTINGS

When you create an invoice you can choose whether or not to automatically send an email notification to the client.

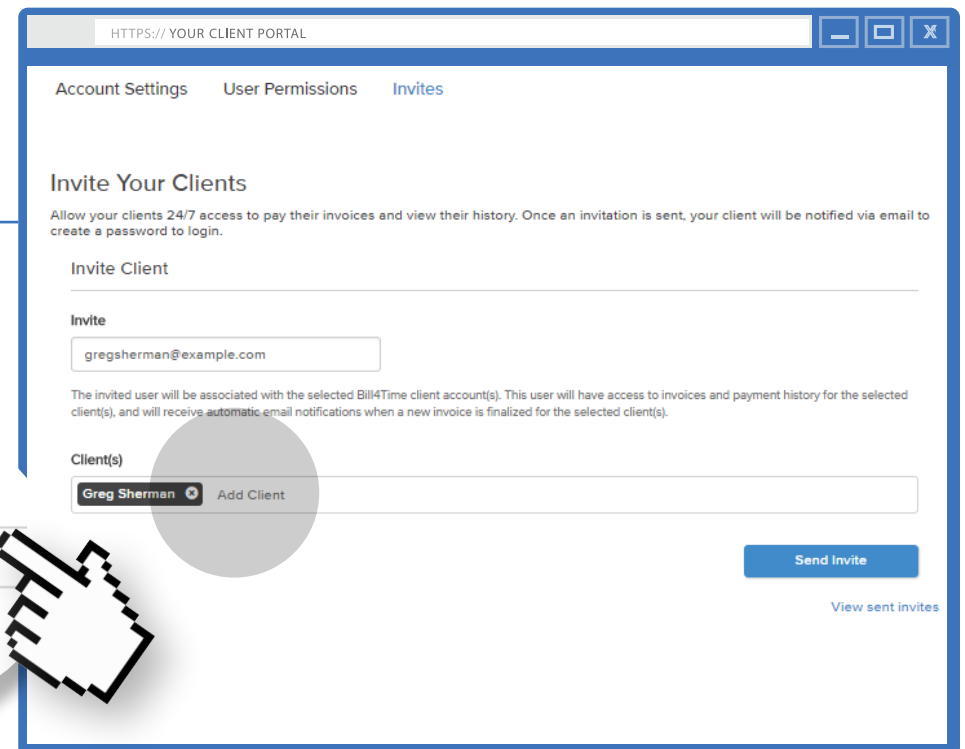
The button highlighted in **BLUE** is the current selection.

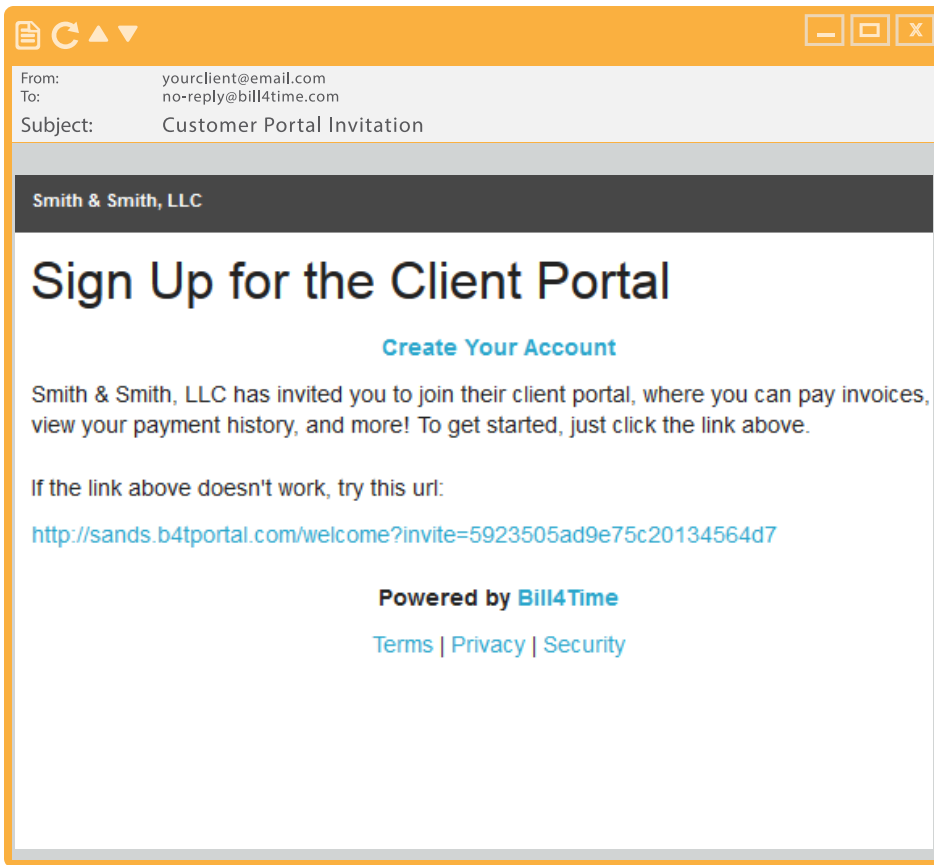
Invite Your Clients

Enter their Email address, choose an associated company or client, then click Send Invite and you're done!

SETTING USER PERMISSIONS

Most of your users will be associated with a single client or business entity. For your users who have more than one business or client, you can associate a single user with multiple entities. Just click Add Client, or you can remove access, to manage certain clients within a user's permission.



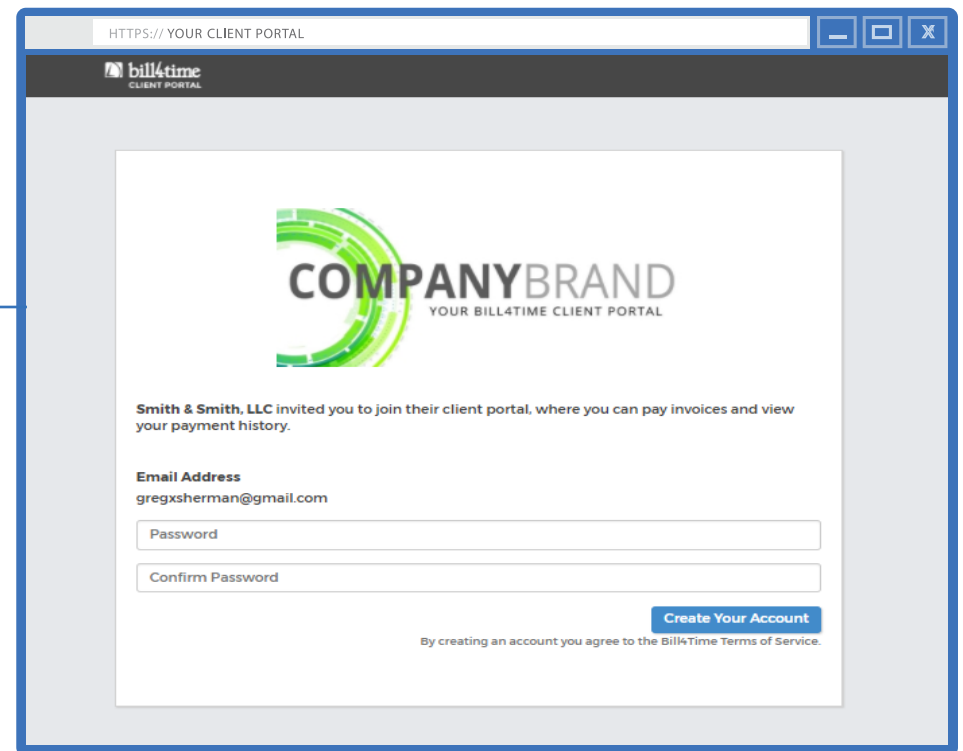


Email Invitation

Your client will receive an email with a link to create an account. Once they click the link, they can create a password to securely sign into their portal to view and pay for their invoices with ease.

Client Password

With one creative password and a click, your client creates an account and is ready to go!



Account Balance: **\$2,658.86**

Payment History

Date	Invoice	Description	Balance
05/24/2017	21678	Single invoice for Greg Sherman - General (10663)	\$2,658.86
03/31/2017	21677	Single invoice for Greg Sherman - General (10663)	\$0.00
01/31/2017	21656	Single invoice for Greg Sherman - General (10663)	\$0.00

Payment History

03/30/2017	\$1,159.25
01/30/2017	\$1,987.50

Invoice Dashboard

After creating an account or successfully logging in, your client will land on the invoices dashboard.

If you have not allowed access to see their history, only unpaid invoices will be shown. By default all unpaid invoices will be selected. For this example we have chosen to show all invoices.

Invoice Preview

By clicking directly on the invoice number, your client can preview each invoice and easily “Pay Now” after review.

Invoice 21678

Greg Sherman
Leslie N. McDonald
210 22nd St
18th Floor
New York, NY 10001

Invoice 21678
Date: May 24, 2017
Service Thru: May 24, 2017

Account Balance: **\$2,658.86**

Invoice Total: **\$2,658.86**

In Reference To: General (Professional Services)

Date	By	Services	Hours	Rates	Amount
04/20/2017	JS	Spoke with client on case.	2.25	\$ 215.00/hr	\$ 483.75
04/25/2017	KIND	Research case details for upcoming meeting.	1.50	\$ 150.00/hr	\$ 225.00
04/25/2017	JS	Wrote documentation on case.	2.50	\$ 215.00/hr	\$ 537.50
05/01/2017	GF	Meeting with client.	1.00	\$ 200.00/hr	\$ 200.00
05/12/2017	JS	Lunch meeting with client.	5.25	\$ 215.00/hr	\$ 1,128.75

In Reference To: General (Expenses)

Date	By	Expenses	Amount
05/12/2017	JS	Filing fees.	\$ 5.00
05/12/2017	JS	Lunch meeting with client.	\$ 78.86

Total Hours: 12.50 hrs
Total Professional Services: \$ 2,575.00
Total Expenses: \$ 83.86
Total Invoice Amount: \$ 2,658.86

Trust Account Summary

Billing Period: 03/31/2017 - 05/24/2017

Matter: General

Total Deposits	Total Disbursements	Current Balance
\$0.00	\$1,159.25	\$6,853.25

User Hours Summary

Billing Period: 04/20/2017 - 05/24/2017

Date	Transaction	Deposit	Disbursement	Balance
03/31/2017	Applied to invoice #21077	\$1,159.25	\$6,853.25	

HTTPS:// YOUR CLIENT PORTAL

bill4time CLIENT PORTAL Home Account History gregxsherman@gmail.com

Pay Now

Did you know you can pay directly with your bank account? [Click here to sign up](#)

Pay invoice total: \$2,658.86
 Pay account balance: \$2,658.86
 Pay other amount

Payment Amount:

\$

Cancel Continue

Payment Confirmation

Once your client clicks to pay for an invoice it will show them the total of the invoice or total balance overall. They can also choose to pay a different amount to enter in manually. Once finished, they can continue to enter in their payment information.

Submit Payment

If you provide both Stripe and PayPal payment options, both will be available for your client to select from. If one option (Stripe or PayPal) is provided, that will be the only option displayed.

Once the payment is submitted, it will automatically deduct from your invoice totals in Bill4Time.

HTTPS:// YOUR CLIENT PORTAL

bill4time CLIENT PORTAL Home Account History gregxsherman@gmail.com

Submit Payment

Payment Total: \$2,658.86

Pay with credit card
 Pay with PayPal

VISA MasterCard AMERICAN EXPRESS DISCOVER JCB

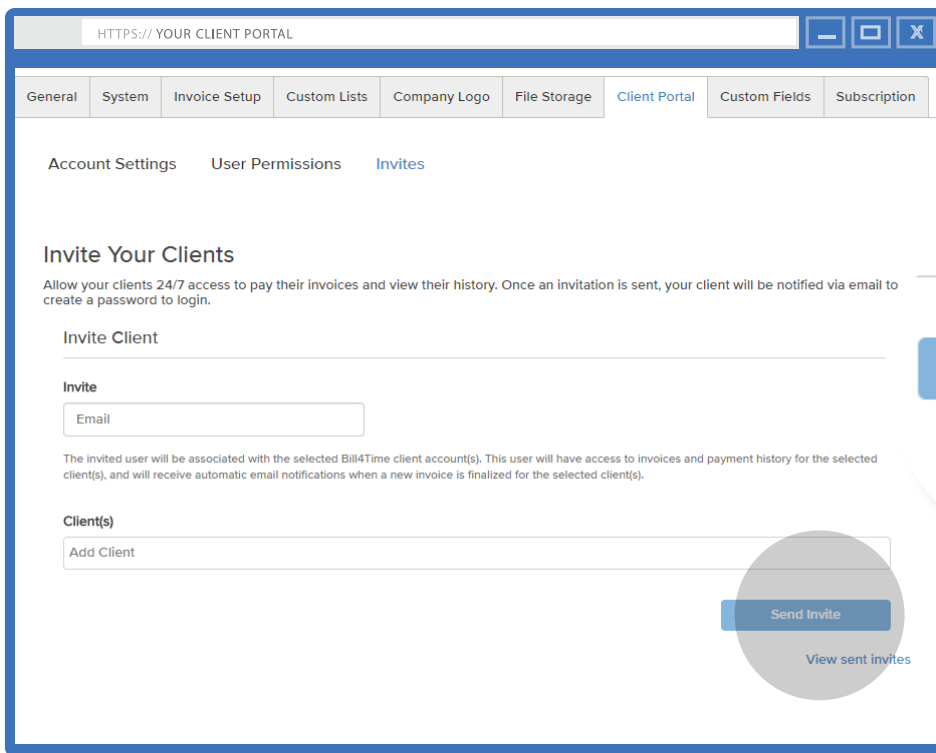
Receipt Email Address

Name on Card

Credit Card Number

Expiration Date **CVV**

Back Submit



View Sent Invites

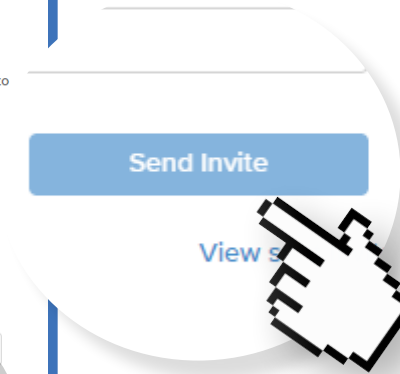
Now see the status of your invitations in real-time. Below is a quick breakdown.

DATE & EMAIL

The date and email address the invitation was sent on and to.

CLIENT

The client(s) associated with the invited user. If you've allowed access to the wrong client, make all changes in User Permissions. If the invitation recipient has not accepted your invitation, send a new invite with the corrected client(s). This action will cancel the previous invite.



Status

ACCEPTED

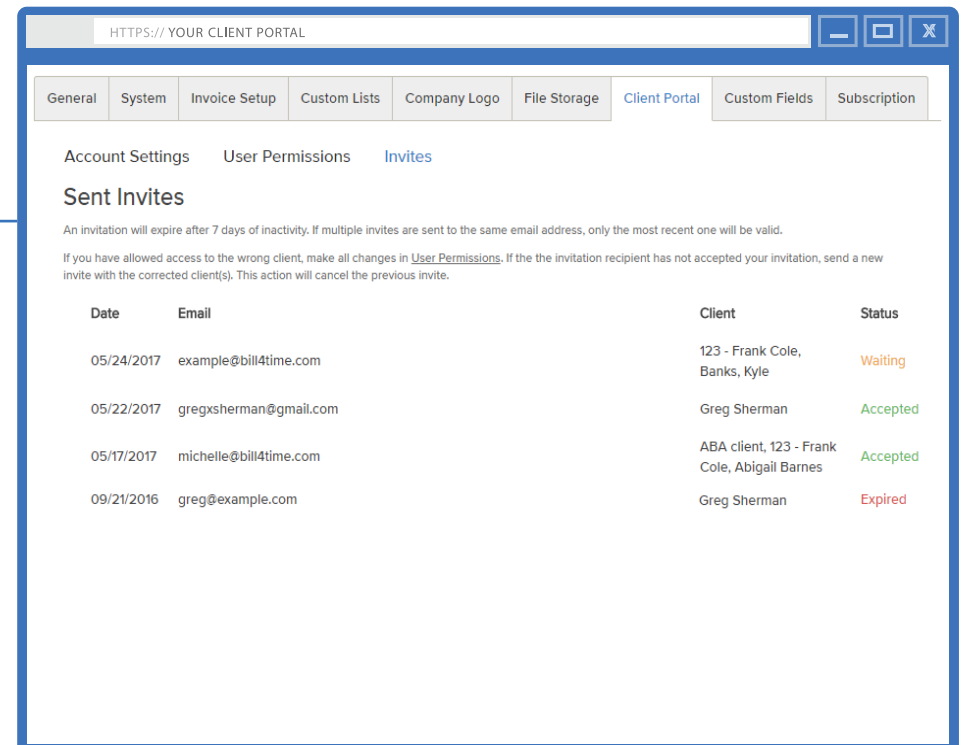
Your client has received your invitation and successfully created an account.

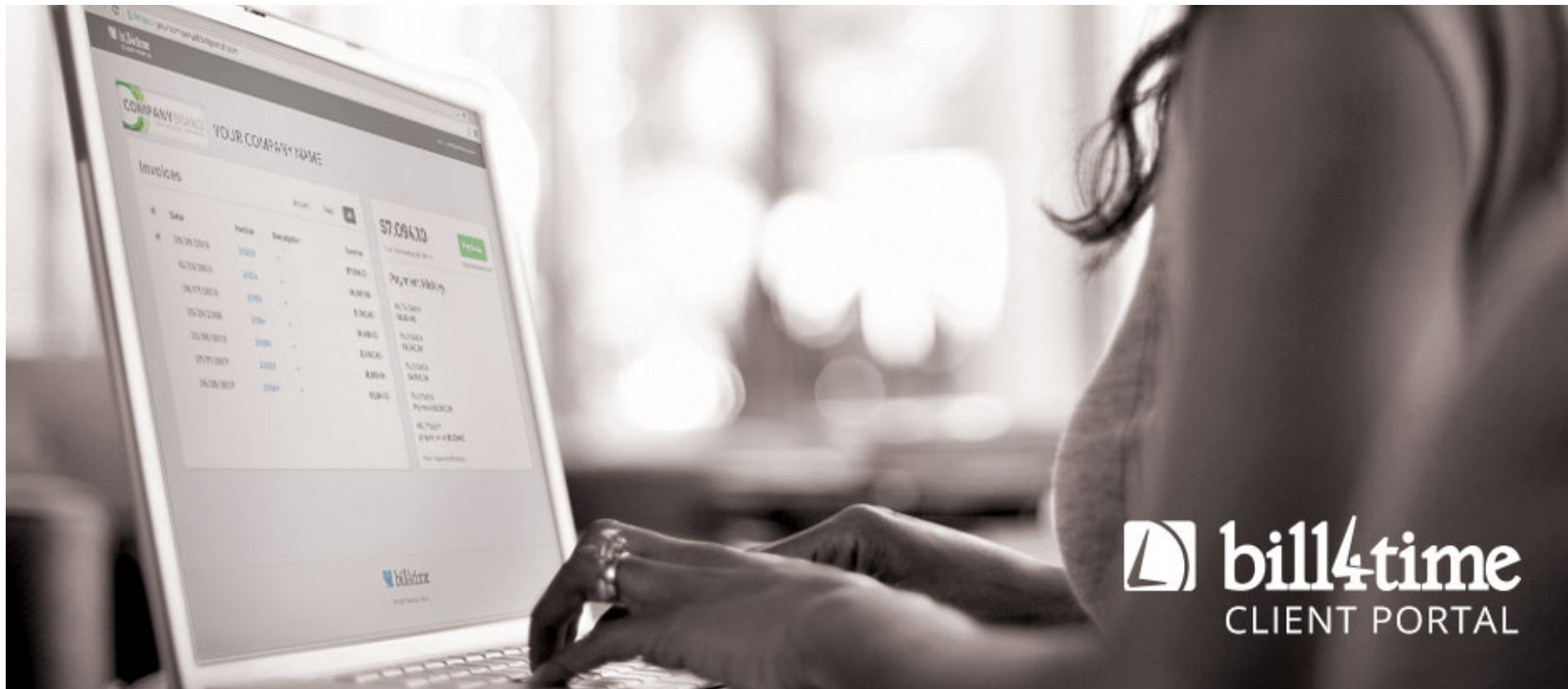
WAITING

Your client has received the email invitation but hasn't clicked through to create an account.

EXPIRED

The invitation due to 7 days of inactivity or if an additional invite was sent to the existing email address.





 **bill4time**
CLIENT PORTAL

That's it!

Now that you know your Client Portal inside and out,
start sending those invitations!

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